

## Office of the State Treasurer and Receiver General Job Description

Job Title: Member Services Representative (Call Center)

Department: State Retirement MSRB

Reports to: Member Services Manager

### PURPOSE OF THE POSITION

The Massachusetts State Retirement Board (MSRB) administers a defined benefit retirement plan for eligible employees of the Commonwealth and certain independent entities.

Through MSRB Call Center the Member Services Representative serves as primary contact and liaison with members of the State Employees' Retirement System ("MSERS"), the general public, and outside agencies for purposes of providing initial customer service and benefit support.

### ESSENTIAL FUNCTIONS AND RESPONSIBILITIES

- Fully address, or properly direct all telephone, electronic, mailed, or in-person inquiries from MSERS members and related individuals to proper personnel
- Competently function as part of the MSRB Call Center
- Maintain working knowledge of each department within MSRB
- Develop ability to understand and explain to members the procedure of each department related to applicable transactions;
- Provide support and assistance to the various departments within the MSRB;
- When appropriate, direct members to related agencies for assistance, such as the Massachusetts Group Insurance Commission, United State Social Security Administration, local retirement systems
- Develop proficiency with OnBase ECM (document scanning) System and demonstrate ability to integrate with daily responsibilities;
- Properly greet and assist members visiting MSRB offices for counseling services
- Assist with accurate and timely distribution or response to all incoming mail and e-mail as appropriate
- Adhere to and enforce Treasury and MSRB policies
- Additional duties as may be assigned by the Manager and/or Director

### OTHER DUTIES AND RESPONSIBILITIES

- Participate and assist in special projects and training as needed
- Adhere to and support MSRB policies
- Distribute information requested by the members related to retirement accounts
- Correspond with active members and retirees on all aspects of retirement, including letters for balances and pension verifications
- Maintain a high level of customer service at all times

- Research member requests and provide responses as necessary
- Availability to occasionally work extended hours

#### SUPERVISORY RESPONSIBILITIES

- N/A

#### KNOWLEGDE AND SKILLS

- Ability to develop working knowledge of retirement plan rules, regulations and state retirement benefits
- Excellent communication, interpersonal and organizational skills are required
- Ability to provide high-level of customer service while working with high volume of inquiries
- Ability to successfully manage multiple tasks
- Current working knowledge of Microsoft Word, Excel, Windows required
- Develop skills to obtain working knowledge of current Retirement MSRB Computer System
- Familiarity or prior experience working with electronic document management systems
- Basic knowledge of multi-line telephone systems

Apply through Mass Careers or by sending their resume and cover letter to [hr@tre.state.ma.us](mailto:hr@tre.state.ma.us).